

ChatGPT Agent Mode — GHL Workflow Builder Prompt

Soleil Pharmacy Automation

HOW TO USE THIS PROMPT

1. Open ChatGPT → enable **Agent Mode** (or use a GPT with browser/computer use)
 2. Make sure you are **logged into GoHighLevel** in the same browser
 3. Paste the **MASTER CONTEXT** block first, then paste each **individual workflow prompt** one at a time
 4. Wait for ChatGPT to complete each workflow before pasting the next
 5. Start with **Step 0 (Pipelines)** — workflows won't work without them
-

MASTER CONTEXT BLOCK

(Paste this first before any workflow prompt)

You are a GoHighLevel automation expert helping build a HIPAA-compliant pharmacy workflow system for "Soleil Pharmacy."

ACCOUNT CONTEXT:

- GHL Location: Soleil Pharmacy
- Industry: Compounding pharmacy (BHRT, IV infusions, specialty compounds)
- Goal: Automate the prescription journey from provider intake to patient refills

HIPAA RULES – CRITICAL – NEVER VIOLATE:

1. NEVER include medication names, diagnoses, or clinical conditions in any SMS or email
2. NEVER include PHI in task titles (task bodies are internal-only and acceptable)
3. Use only generic language in patient-facing messages: "your order", "your item", "requires attention"
4. GHL must be in HIPAA Compliance Mode before any workflow goes live

CONFIRMED CUSTOM FIELDS (already created in GHL):

- contact.pioneer_rx_ (Pioneer Rx #)
- contact.formula_id
- contact.prescriber_name
- contact.prescriber_npi
- contact.days_supply
- contact.rx_expiration_date
- contact.refill_count_remaining
- contact.compound_type
- contact.consent_signed_date
- contact.payment_date
- contact.shipped_date
- contact.tracking_number
- contact.shipment_carrier
- contact.autorefill_enrolled
- contact.preferred_language

- contact.npi_number
- contact.clinic_name
- contact.preferred_communication
- contact.portal_activation_date
- contact.contract_signed_date

CONFIRMED CUSTOM VALUES (already created in GHL – use in templates):

- {{custom_values.secure_payment_link}}
- {{custom_values.pharmacy_address}}
- {{custom_values.pharmacy_phone}}
- {{custom_values.pharmacy_hours}}
- {{custom_values.portal_guide_url}}
- {{custom_values.calendly_link}}

REQUIRED PIPELINES (you will create these in Step 0):

1. "B2B Provider Sales Pipeline"

Stages: Lead → Contacted → Demo Scheduled → Credentialing → Contract Signed →
Portal Activated

2. "Patient Rx Fulfillment Pipeline"

Stages: Rx Received → Pharmacist Review → Pending Payment → Compounding → Ready for
Pickup → Shipped → Complete

Acknowledge you have read and understood this context before proceeding.

STEP 0 — CREATE PIPELINES

(Must be done before any workflow. Paste after Master Context.)

Navigate to GoHighLevel.

TASK: Create two pipelines in CRM → Pipelines.

PIPELINE 1 – "B2B Provider Sales Pipeline":

- Click "+ New Pipeline"
- Name: B2B Provider Sales Pipeline
- Add stages in this exact order:
 1. Lead
 2. Contacted
 3. Demo Scheduled
 4. Credentialing
 5. Contract Signed
 6. Portal Activated
- Save

PIPELINE 2 – "Patient Rx Fulfillment Pipeline":

- Click "+ New Pipeline"
- Name: Patient Rx Fulfillment Pipeline
- Add stages in this exact order:
 1. Rx Received
 2. Pharmacist Review

- 3. Pending Payment
 - 4. Compounding
 - 5. Ready for Pickup
 - 6. Shipped
 - 7. Complete
- Save

Confirm both pipelines are saved and visible in CRM → Pipelines.
Take a screenshot of the pipelines list as confirmation.

WORKFLOW 1 — B2B Lead Nurture & Onboarding

Navigate to GoHighLevel → Automation → Workflows → + Create Workflow → Start from Scratch.

WORKFLOW NAME: B2B Lead Nurture & Onboarding

SETTINGS:

- Allow Re-entry: OFF
- Stop on Response: ON
- Status: Draft (do not publish until reviewed)

TRIGGER:

- Trigger type: Contact Tag
- Filter: Tag is added = "B2B-Lead"

NODES (build in this exact order):

Node 1 – Send Email

- Action: Send Email
- Template: Select "Welcome to Soleil Prescriber Portal"
(If template doesn't exist yet, create it with this body:)
Subject: Welcome to the Soleil Pharmacy Prescriber Portal
Body: Hello {{contact.first_name}}, welcome to the Soleil Pharmacy Prescriber Portal.
Your portal guide: {{custom_values.portal_guide_url}}
Book an onboarding call: {{custom_values.calendly_link}}

Node 2 – Send SMS

- Action: Send SMS
- Message: Hi {{contact.first_name}}, thanks for your interest in Soleil Pharmacy.
Check your email for portal access details. Questions? Reply here.

Node 3 – Create/Update Opportunity

- Action: Create or Update Opportunity
- Pipeline: B2B Provider Sales Pipeline
- Stage: Lead
- Opportunity name: {{contact.full_name}} - {{contact.clinic_name}}

Node 4 – Create Task

- Action: Add Task
- Title: Follow up – verify NPI
- Description: New B2B lead. Verify NPI: {{contact.npi_number}}. Clinic: {{contact.clinic_name}}. Follow up within 24 hours.
- Due: 1 day from now
- Assign to: [assign to SDR/owner]

Node 5 – Wait

- Type: Time Delay
- Duration: 2 Days

Node 6 – If/Else

- Condition: Contact Tag contains "Portal-Activated"
- Branch YES → Node 7 (Remove from Workflow / End)
- Branch NO → Node 8

Node 7 (YES branch) – Remove from Workflow / End

Node 8 (NO branch) – Send Email

- Action: Send Email
- Subject: Ready for your Soleil Pharmacy portal demo?
- Body: Hi {{contact.first_name}}, book your 15-minute walkthrough here: {{custom_values.calendly_link}}

Node 9 – Wait

- Duration: 3 Days

Node 10 – If/Else

- Condition: Contact Tag contains "Portal-Activated"
- Branch YES → End
- Branch NO → Node 11

Node 11 (NO branch) – Create Task

- Title: Manual follow-up required
- Description: {{contact.clinic_name}} has not activated portal after 5 days. Manual outreach needed. Contact: {{contact.full_name}}, {{contact.email}}, {{contact.phone}}.
- Due: Today
- Assign to: [SDR/owner]

Save as Draft. Do not publish yet.

WORKFLOW 2 — Rx Intake & Pharmacist Alert

Navigate to Automation → Workflows → + Create Workflow → Start from Scratch.

WORKFLOW NAME: Rx Intake & Pharmacist Alert

SETTINGS:

- Allow Re-entry: ON (same patient can have multiple Rx)
- Stop on Response: OFF

- Status: Draft

TRIGGER:

- Trigger type: Pipeline Stage Changed
- Pipeline: Patient Rx Fulfillment Pipeline
- Stage: Rx Received

NODES:

Node 1 – Add Tag

- Tags to add: Rx-Received

Node 2 – Update Contact Field

- Field: contact.pioneer_rx_ → use value from trigger/webhook if available

Node 3 – Create/Update Opportunity

- Pipeline: Patient Rx Fulfillment Pipeline
 - Stage: Pharmacist Review
- (This moves the card forward automatically)

Node 4 – Add Tag

- Tags to add: Pharmacist-Review-Pending

Node 5 – Internal Notification (Send Email to Team)

- Action: Send Email (internal – to pharmacist's email address)
- To: [pharmacist email address – fill in]
- Subject: New Rx Ready for Review
- Body: A new prescription is ready for pharmacist review in GHL.
Pioneer Rx #: {{contact.pioneer_rx_}}
Formula: {{contact.formula_id}}
Patient: {{contact.first_name}} (contact ID: {{contact.id}})
Please review and move to Pending Payment when verified.

Node 6 – Wait

- Type: Time Delay
- Duration: 2 Hours

Node 7 – If/Else

- Condition: Pipeline Stage = "Pharmacist Review" (still in review after 2 hours)
- Branch YES (still pending) → Node 8
- Branch NO (moved forward) → End

Node 8 (YES) – Internal Notification

- Send Email to pharmacist + Thuy
- Subject: ALERT: Rx pending review >2 hours
- Body: An Rx has been in Pharmacist Review for over 2 hours.
Pioneer Rx #: {{contact.pioneer_rx_}}
Please review immediately.

Save as Draft.

WORKFLOW 3 — Patient Payment & Consent Chase

(Most critical — build this first if short on time)

Navigate to Automation → Workflows → + Create Workflow → Start from Scratch.

WORKFLOW NAME: Patient Rx – Payment & Consent Chase

SETTINGS:

- Allow Re-entry: OFF
- Stop on Response: ON ← CRITICAL for TCPA compliance
- Status: Draft

TRIGGER:

- Trigger type: Pipeline Stage Changed
- Pipeline: Patient Rx Fulfillment Pipeline
- Stage: Pending Payment

NODES:

Node 1 – Add Tag

- Tags to add: Payment-Pending

Node 2 – Send SMS

- Message: Your order from Soleil Pharmacy requires your attention. Please complete your secure form here: {{custom_values.secure_payment_link}}
- Reply STOP to opt out.
- HIPAA CHECK: No medication names. No diagnoses. Generic language only. ✓

Node 3 – Send Email

- Subject: Action Required: Soleil Pharmacy Order
- Body:

Hello {{contact.first_name}},
Your order from Soleil Pharmacy requires your attention before we can proceed.
Please click below to complete your payment and consent forms:
{{custom_values.secure_payment_link}}
Questions? Call us: {{custom_values.pharmacy_phone}}
Thank you, Soleil Pharmacy Team

Node 4 – Wait

- Duration: 24 Hours

Node 5 – If/Else

- Condition: Contact Tag contains "Payment-Complete"
- Branch YES → Node 6
- Branch NO → Node 7

Node 6 (YES – paid within 24hrs):

- Sub-node A – Add Tag: Consent-Signed
- Sub-node B – Update Custom Field: consent_signed_date = {{now | date: "YYYY-MM-DD"}}
- Sub-node C – Update Custom Field: payment_date = {{now | date: "YYYY-MM-DD"}}

Sub-node D – Update Opportunity Stage → Compounding
Sub-node E – Remove Tag: Payment-Pending
→ End

Node 7 (NO – not yet paid):
Sub-node – Send SMS Reminder:
Reminder from Soleil Pharmacy: your order is still waiting on payment and consent.
Complete it here: {{custom_values.secure_payment_link}}

Node 8 – Wait
– Duration: 24 Hours

Node 9 – If/Else
– Condition: Contact Tag contains "Payment-Complete"
– Branch YES → Node 10 (same as Node 6 – paid/consent/move to Compounding)
– Branch NO → Node 11

Node 10 (YES):
Same actions as Node 6 above (add tags, set dates, move pipeline, remove Payment-Pending)
→ End

Node 11 (NO):
Sub-node – Send Email Reminder #2:
Subject: Final Reminder: Soleil Pharmacy Order
Body: Hi {{contact.first_name}}, this is a final reminder to complete your Soleil Pharmacy order.
{{custom_values.secure_payment_link}}
If you need help, call us at {{custom_values.pharmacy_phone}}.

Node 12 – Wait
– Duration: 24 Hours

Node 13 – If/Else
– Condition: Contact Tag contains "Payment-Complete"
– Branch YES → Node 14 (same paid resolution)
– Branch NO → Node 15

Node 14 (YES): Same paid resolution actions → End

Node 15 (NO – 3 days, no payment):
Sub-node A – Create Task:
Title: Call Patient – Payment Not Received
Description: Patient {{contact.first_name}} {{contact.last_name}} has not completed payment after 3 automated reminders (72 hours). Please call {{contact.phone}} to assist.
Pioneer Rx #: {{contact.pioneer_rx_}}
Do NOT leave a voicemail mentioning medications or pharmacy services.
Due: Today
Assign to: [staff/owner]
Sub-node B – Remove Tag: Payment-Pending

Save as Draft.

WORKFLOW 4A — Compounding Status Notification

Navigate to Automation → Workflows → + Create Workflow → Start from Scratch.

WORKFLOW NAME: Order Status – Compounding Started

SETTINGS:

- Allow Re-entry: ON
- Stop on Response: OFF
- Status: Draft

TRIGGER:

- Pipeline Stage Changed
- Pipeline: Patient Rx Fulfillment Pipeline
- Stage: Compounding

NODES:

Node 1 – Add Tag

- Tags to add: Compounding

Node 2 – Send SMS

- Message: Good news – Soleil Pharmacy has started preparing your order.
We'll notify you as soon as it's ready. Questions? {{custom_values.pharmacy_phone}}

Save as Draft.

WORKFLOW 4B — Order Shipped Notification

Navigate to Automation → Workflows → + Create Workflow → Start from Scratch.

WORKFLOW NAME: Order Status – Shipped

SETTINGS:

- Allow Re-entry: ON
- Stop on Response: OFF

TRIGGER:

- Pipeline Stage Changed
- Pipeline: Patient Rx Fulfillment Pipeline
- Stage: Shipped

NODES:

Node 1 – Add Tag: Shipped

Node 2 – Update Custom Field

- Field: contact.shipped_date
- Value: {{now | date: "YYYY-MM-DD"}}

Node 3 – Send SMS

- Message: Your Soleil Pharmacy order is on its way!
- Carrier: {{contact.shipment_carrier}}
- Tracking: {{contact.tracking_number}}
- Questions? {{custom_values.pharmacy_phone}}

Node 4 – Send Email

- Subject: Your Soleil Pharmacy Order Has Shipped
- Body:

Hi {{contact.first_name}},
Your order is on its way!
Carrier: {{contact.shipment_carrier}}
Tracking number: {{contact.tracking_number}}
Soleil Pharmacy | {{custom_values.pharmacy_phone}}

Save as Draft.

WORKFLOW 4C — Ready for Pickup Notification

Navigate to Automation → Workflows → + Create Workflow → Start from Scratch.

WORKFLOW NAME: Order Status – Ready for Pickup

SETTINGS:

- Allow Re-entry: ON
- Stop on Response: OFF

TRIGGER:

- Pipeline Stage Changed
- Pipeline: Patient Rx Fulfillment Pipeline
- Stage: Ready for Pickup

NODES:

Node 1 – Send SMS

- Message: Your Soleil Pharmacy order is ready for pickup!
- Address: {{custom_values.pharmacy_address}}
- Hours: {{custom_values.pharmacy_hours}}
- Please bring a valid photo ID.

Node 2 – Send Email

- Subject: Your Soleil Pharmacy Order is Ready for Pickup
- Body:

Hi {{contact.first_name}},
Your order is ready and waiting!
Pickup location: {{custom_values.pharmacy_address}}

Hours: {{custom_values.pharmacy_hours}}
Please bring a valid photo ID. See you soon!
Soleil Pharmacy Team

Save as Draft.

WORKFLOW 5 — Refill Reminder (Dynamic)

Navigate to Automation → Workflows → + Create Workflow → Start from Scratch.

WORKFLOW NAME: Refill Reminder – Dynamic

SETTINGS:

- Allow Re-entry: ON (each new shipment restarts the refill clock)
- Stop on Response: ON

TRIGGER:

- Contact Tag Added
- Tag: Shipped

NODES:

Node 1 – Wait (Dynamic – based on Days Supply)

- Wait type: Custom Date/Field-Based
- Calculate: {{contact.shipped_date}} + ({{contact.days_supply}} - 9) days
- If GHL does not support field math natively, set:
Wait until custom date field = contact.shipped_date
Then add manual wait of 21 days (for 30-day supply default)
NOTE: For 60/90-day supplies, staff will need to manually adjust.
Log this as a limitation to revisit when upgrading to GHL V2 API.

Node 2 – If/Else

- Condition: Contact Tag contains "Rx-Expired"
- Branch YES → End (do not send refill prompts on expired Rx)
- Branch NO → Node 3

Node 3 – If/Else

- Condition: Contact Custom Field "refill_count_remaining" = 0
- Branch YES → Node 4 (new Rx needed)
- Branch NO → Node 5 (refill available)

Node 4 (YES – no refills left):

Sub-node A – Add Tag: New-Rx-Required

Sub-node B – Send SMS:

Hi {{contact.first_name}}, it may be time to reorder from Soleil Pharmacy.
Please contact your provider for a new prescription, then call us at
{{custom_values.pharmacy_phone}} to get started.

Sub-node C – Create Task:

Title: Alert provider – patient needs new Rx

Description: Patient {{contact.first_name}} {{contact.last_name}} has 0 refills

remaining.

- Prescriber: {{contact.prescriber_name}} | NPI: {{contact.prescriber_npi}}
- Contact patient at {{contact.phone}} after provider reauthorizes.

→ End

Node 5 (N0 – refills available):

Sub-node – Send SMS:

Hi {{contact.first_name}}, your Soleil Pharmacy order may be running low.
Reply YES to start your refill, or call us at {{custom_values.pharmacy_phone}}.

Node 6 – Wait

- Duration: 48 Hours

Node 7 – If/Else

- Condition: Contact replied "YES" OR Tag "Refill-Requested" added
- Branch YES → Node 8
- Branch N0 → Node 9

Node 8 (YES – wants refill):

Sub-node A – Update Opportunity Stage → Pending Payment
(This re-triggers Workflow 3 – Payment & Consent Chase)

Sub-node B – Send Internal Email to pharmacist:

Refill requested by {{contact.first_name}}. Prescriber:
{{contact.prescriber_name}}.

Pioneer Rx #: {{contact.pioneer_rx_}}

→ End

Node 9 (N0 – no reply after 48hrs):

Sub-node A – Send one final SMS:

Just a reminder from Soleil Pharmacy – reply YES to refill or call us at {{custom_values.pharmacy_phone}}.

Sub-node B – Wait 24 Hours

Sub-node C – Create Task if still no reply:

Title: Follow up – patient hasn't responded to refill prompt

Description: {{contact.first_name}} {{contact.last_name}} | {{contact.phone}}

Pioneer Rx #: {{contact.pioneer_rx_}}

Save as Draft.

WORKFLOW 6 — Legacy Fax Exception

Navigate to Automation → Workflows → + Create Workflow → Start from Scratch.

WORKFLOW NAME: Legacy Fax – Portal Training

SETTINGS:

- Allow Re-entry: OFF
- Stop on Response: OFF

TRIGGER:

- Contact Tag Added
- Tag: Legacy-Fax-User

NODES:

Node 1 – Create Task

- Title: Manual Rx entry required – fax received
- Description: Legacy fax received from {{contact.clinic_name}}.
Provider: {{contact.full_name}} | NPI: {{contact.npi_number}}
Action: Enter Rx into Pioneer manually. Then schedule portal training call.
Do not process until data entry is complete.
- Due: Today
- Assign to: [SDR/staff]

Node 2 – Add Tag: Portal-Training-Pending

Node 3 – Send Email to Provider

- Subject: We received your prescription – here's a faster way
- Body:

Hi {{contact.first_name}},
We received your prescription and are processing it now.
To save time on future orders, you can submit directly through our prescriber portal:
{{custom_values.portal_guide_url}}
To schedule a quick walkthrough: {{custom_values.calendly_link}}
Thank you, Soleil Pharmacy Team

Node 4 – Wait

- Duration: 3 Days

Node 5 – If/Else

- Condition: Contact Tag contains "Portal-Activated"
- Branch YES → Node 6
- Branch NO → Node 7

Node 6 (YES):

- Sub-node – Remove Tag: Legacy-Fax-User
- End

Node 7 (NO):

- Sub-node – Create Task:

Title: Provider still on fax – training call needed
Description: {{contact.clinic_name}} has not activated portal 3 days after fax outreach.
Contact: {{contact.full_name}} | {{contact.phone}} | {{contact.email}}
Schedule a training call ASAP.
- End

Save as Draft.

WORKFLOW 7 — Provider Portal Onboarding (Post Contract)

Navigate to Automation → Workflows → + Create Workflow → Start from Scratch.

WORKFLOW NAME: Provider Portal Onboarding

SETTINGS:

- Allow Re-entry: OFF
- Stop on Response: OFF

TRIGGER:

- Pipeline Stage Changed
- Pipeline: B2B Provider Sales Pipeline
- Stage: Contract Signed

NODES:

Node 1 – Send Email

- Subject: Welcome to Soleil Pharmacy – Your Portal Access
- Body:

Hi {{contact.first_name}},
Your Soleil Pharmacy prescriber portal is ready.
Get started: {{custom_values.portal_guide_url}}
Book a walkthrough: {{custom_values.calendly_link}}
We're here to make prescribing seamless for you and your patients.
Soleil Pharmacy Team

Node 2 – Send SMS

- Message: Hi {{contact.first_name}}, your Soleil Pharmacy portal access is ready.
Check your email for login details. Questions? Reply here.

Node 3 – Wait

- Duration: 2 Days

Node 4 – If/Else

- Condition: Contact Tag contains "Portal-Activated"
- Branch YES → Node 5
- Branch NO → Node 6

Node 5 (YES – activated):

- Sub-node A – Send Email:

Subject: You're all set – Soleil Pharmacy Portal
Body: Hi {{contact.first_name}}, great news – your portal is active and ready.
Submit your first prescription anytime: {{custom_values.portal_guide_url}}
- Sub-node B – Update Opportunity Stage → Portal Activated
- End

Node 6 (NO – not yet activated):

- Sub-node – Send Email:

Subject: Need help getting started? Book a 1-on-1 with Soleil Pharmacy
Body: Hi {{contact.first_name}}, we noticed you haven't logged in yet.

Book a 15-minute walkthrough and we'll get you set up:
{{custom_values.calendly_link}}

Node 7 – Wait

- Duration: 3 Days

Node 8 – If/Else

- Condition: Tag "Portal-Activated" present
- Branch YES → End
- Branch NO → Node 9

Node 9 (NO – 5 days, still not activated):

Sub-node – Create Task:

Title: Manual onboarding needed

Description: {{contact.clinic_name}} has not activated portal after 5 days.

Call: {{contact.phone}} | Email: {{contact.email}}

NPI: {{contact.npi_number}}

Assign to: [SDR]

Save as Draft.

FINAL VERIFICATION CHECKLIST

Once all workflows are built, verify the following before publishing any:

- Both pipelines created with correct stage names (exact spelling matters)
- All 7 workflows saved as Draft
- Workflow 3 (Payment Chase): Stop on Response = ON
- All patient-facing SMS/emails reviewed – zero medication names or PHI
- Custom Values populated with real URLs (Settings → Custom Values):
 - secure_payment_link → payment portal URL
 - pharmacy_address → full address
 - pharmacy_phone → phone number
 - pharmacy_hours → hours string
 - portal_guide_url → prescriber guide URL
 - calendly_link → booking URL
- HIPAA mode enabled (Settings → Business Profile)
- BAA signed with GHL
- 10DLC SMS registered (Settings → Phone Numbers)

PUBLISH ORDER:

1. Workflow 3 (Payment Chase) – first, it's the revenue engine
2. Workflow 4A/4B/4C (Status Updates)
3. Workflow 2 (Rx Intake)
4. Workflow 5 (Refill Reminder)
5. Workflow 1 (B2B Lead Nurture)
6. Workflow 7 (Provider Onboarding)
7. Workflow 6 (Legacy Fax) – last, it's edge-case handling